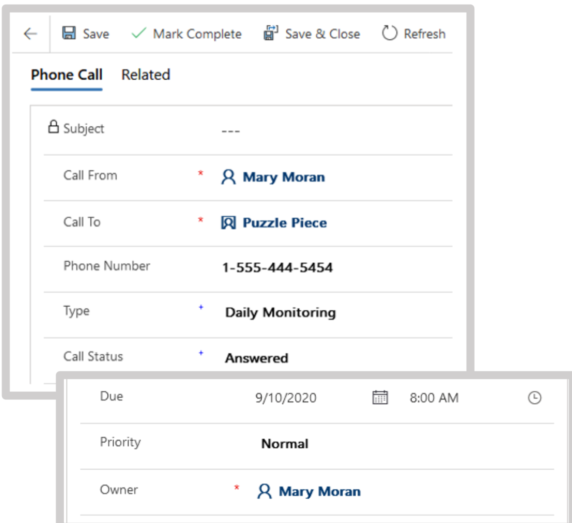
CCTO Micro-Training

Timeline/Activities: Quick Reference

Timeline/Activities helps you document and track your outreach and monitoring. See below for a broad explanation of when and how to use each type of item:

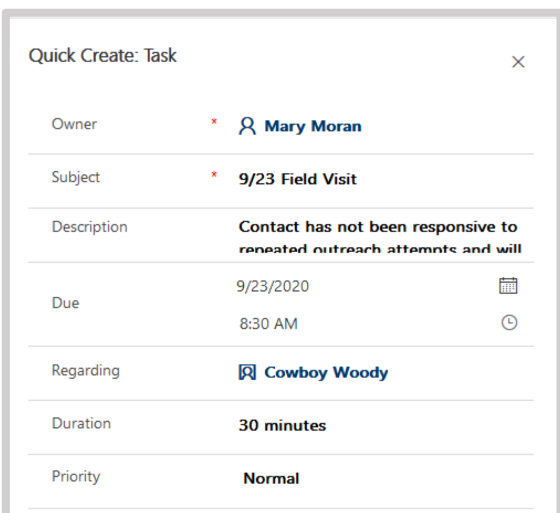
In Timeline/Activities, click +, then select...



Phone Call...

... to document or schedule all attempted or successful phone outreach.

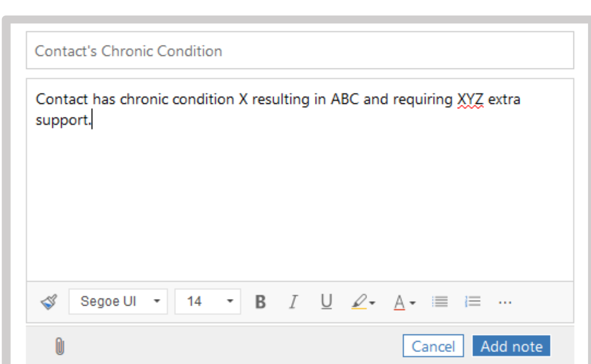
- ✓ **Must use "Type" & "Call Status"** to provide details
- ✓ Use "**Owner**" to assign
- ✓ Use "**Due**" to schedule in advance
- ✓ **Must close when complete** by clicking the check in *Mark Complete* or Timeline/Activities *(see footnote)*
- ✗ **IGNORE** the "Made/Received" toggle when closing
- ! **DOES NOT replace a referral.** To document a referral, log both a phone call and a referral (*job aid*)



Task...

... to document or schedule all other monitoring activities, such review of assessments or other necessary follow-up activities.

- ✓ Follow local protocol on "**Subject**" and "**Description**"
- ✓ Use "**Due**" to schedule in advance
- ✓ Use "**Owner**" to assign
- ✓ **Must close when complete** by clicking the check in Timeline/Activities (*see footnote)*



Note...

... to record reference information, such as resource needs or chronic conditions.

- ✓ Record **reference information** only
- ✗ Do **NOT** use to record tasks or phone calls

Always remember to **close out your completed phone calls and tasks** by hovering over the item, clicking the checkmark, and selecting the appropriate "State" option **ONLY**.